**Mississippi University for Women**

**Employee Transfer Checklist – *Receiving 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 to your department from 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.

|  |  |  |  |
| --- | --- | --- | --- |
| **Employee’s Name:** | | **Banner ID:** | |
| **New Job Title:** |  | | |
| **New Department:** | | |  |
| **Effective Date:** | | |  |
|  | |  | |
| **Date Completed** | | **For Department/Unit** | |
|  | | Prepare workstation/office set up (office supplies, update “How To” desk manual, etc.). | |
|  | | Activate employee 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.) | |
|  | | Request employee emergency contact numbers to keep on file. | |
|  | | Review building/office emergency plan. | |
| **Date Completed** | | **For Human Resources** | |
|  | | Biweekly-paid employees should update time sheet and monthly leave record with new department information. Contact HR with questions. | |
|  | | Monthly-paid employees will submit a leave record for their new department in BannerWeb on the last working day of the month in the new department. | |
| **Date Completed** | | **For ITS** | |
|  | | Supervisor requests access to employee’s computer. | |
|  | | Request Banner 9 access by completing this form: <https://www.muw.edu/images/admin/admin/hr/current/forms/banneraccessformv3.pdf> | |
|  | | Employee completes the Confidentiality and Security Agreement. Form is kept on file in the department. Do not forward form to ITS for current employees. <http://www.muw.edu/images/admin/admin/hr/current/forms/confidentialityagreement.pdf> | |
|  | | Update phone name, voicemail and password. | |
| **Date Completed** | | **For Facilities** | |
|  | | Supervisor completes key request form Facilities Management. <https://www.muw.edu/facilities/keys> | |
| **Date Completed** | | **For Resources Management** | |
|  | | Contact Resources Management to assign inventory to employee. | |
|  | | Complete Procurement Card application. | |
|  | | Employee completes the Conflict of Interest and Procurement Ethics Statement. (Original to be maintained in the department and a copy sent to Resources Management.) <https://www.muw.edu/images/admin/admin/resources/purchasing/documents/Conflict_Of_Interest_Procurement_Ethics_Statement.pdf> | |
|  | |  | |
| **Date Completed** | | **For University Accounting** | |
|  | | If employee is a budget manager, contact Accounting for instructions and forms. | |
|  | | Complete Travel Procurement Card application. | |
|  | | Request long-distance PIN code. | |
| **Date Completed** | | **For MUW Police Department** | |
|  | | Request ID card swipe access. | |
| **Date Completed** | | **Additional Tasks to Complete** | |