Checklist for Supervisors of Transferring Employees

In accordance with JMU Policy [1314](http://www.jmu.edu/JMUpolicy/policies/1314.shtml)-Transfer or Separation from Employment supervisors are responsible for taking action before the employee transfers from one position into another position.

**Follow these four steps to comply with the university’s mandate to safeguard university data and property:**

1. Attend to items that apply and check the corresponding boxes.
2. If nothing on the checklist applies, check the **No Action Taken** box.

|  |  |  |  |
| --- | --- | --- | --- |
| **Action Items** | **Action Details** | **Done** | **N/A** |
| **Return building/office keys** | Employee physically returns keys to FM Lock Shop |  |  |
| **Remove JACard electronic door access** | Contact Building Coordinator to disable access |  |  |
| **Retrieve university property** | * Desk and cabinet keys
* Electronic devices
* Key fob
* Small Purchase Card (SPCC)
* Travel Card
* Uniforms
 |  |  |
| **Contact Telecom**telecom@jmu.edu | Update Telecom Services* JMU Phone Number User
* Wireless Device(s)
* Conference Card
* Pager
 |  |  |
| **No supervisor action is required by the** | **Information Technology will automatically** |  |  |
| **Department from which the employee is transferring. The new supervisor will request system access, as needed, for the employee’s new position.**  | **deactivate access to the following:**Administrative & Business Systems (e.g. PeopleSoft)Elevated AccountsFile Storage (N:Drive)Shared Mailboxes |
|  | Shared Calendars |
|  | Remote Access (VDI)SSL VPN  |
|  |  |
| **Collect Time and Attendance Records and time sheets** | 1. **Non-exempt classified staff**
	* Only applicable to those employees transferring to a part-time or full-time exempt position
	* Prompt employee to submit Time and Attendance Record to HR via email: benefits@jmu.edu
2. **Wage employees**
	* Process according to JMU Payroll policy
 |  |  |
| **Initiate PAR to end stipend(s)** | * Cell phone
* Internet
* Vehicle
 |  |  |
| **Other** | Please specify: |  |  |
| **None of the above items apply** | Employee has no property to return; no accesses granted for this job. | **No Action Taken:** |

1. Complete the following information:

Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Employee number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Transfer Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Form Completed Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Supervisor or Designee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***Retain the signed checklist in your department’s files for five years. The Auditor of Public Accounts or JMU Audit and Management Services may contact you/your department to provide the checklist anytime within the five-year document retention period.***

Questions? Contact 540-568-3967, humanresources@jmu.edu. November 2019