

EMPLOYEE TRANSFER CHECKLIST

Page 1 Completed by Employee & Supervisor

Employee Information:			
Employee's Name: _____	Supervisor's Name: _____		
Employee's Banner ID: _____	Department: _____		
Separation Date: _____	Division: _____		
As the employee, have you returned to your supervisor or department representative:		Employee's Initials & Date	Supervisor's Initials & Date
Letter of resignation?	Yes N/A		
Approved/signed timecard?	Yes N/A		
All university property? (Keys, laptop, cell phone, etc.)	Yes N/A		
All university-related files, sensitive data, and Outlook emails regarding current projects?	Yes N/A		
ProCard? (Complete the ProCard Account Maintenance form and shred the card)	Yes N/A		
Cancellation of authority forms with Financial Services and audit/transfer of petty cash?	Yes N/A		
Have you also:			
Completed a transfer interview? <ul style="list-style-type: none"> • SHRA, CSS, DMSS, EHRA Non-Faculty, & EHRA Faculty: email employeerelations@ecu.edu • BSOM EHRA Faculty: email facdevsom@ecu.edu 	Yes N/A		
Removed all university-related files, sensitive data, and Outlook emails regarding current projects from ECU devices, personal devices, and storage locations (OneDrive and PirateDrive)?	Yes N/A		

EMPLOYEE TRANSFER CHECKLIST

Page 2 Completed by Supervisor

Employee Information:		
Employee's Name: _____	Supervisor's Name: _____	
Employee's Banner ID: _____	Department: _____	
Separation Date: _____	Division: _____	
As the supervisor, have you:		Supervisor's Initials & Date:
Accepted the employee's resignation in writing?	Yes N/A	
Approved/signed the employee's timecard (Kronos) or leave record? (Forward paper timesheets/leave records to the employee's new department)	Yes N/A	
Obtained the employee's university-related files, sensitive data, and Outlook emails regarding current projects in the department?	Yes N/A	
Collected all university property from the employee and signed the Property Assignment Form? (Keys, iPad, laptop, uniforms, etc.)	Yes N/A	
Cancelled the employee's security and building access codes? (Email 1card@ecu.edu and include the employee's name and Banner ID)	Yes N/A	
Removed the employee's user access to department resources? (Microsoft Teams, PirateDrive, social media, etc.)	Yes N/A	
Completed the employee's transfer evaluation? (Optional) (Email employeerelations@ecu.edu with questions)	Yes N/A	
Advised the employee to contact the appropriate campus office to complete a transfer interview?	Yes N/A	
Reviewed the UNC System Records Retention Schedule for the appropriate disposition of all paper and digital files in your possession? (Email recordsmanagement@ecu.edu with questions)	Yes N/A	
Contacted Space Planning to return the office space for reallocation or code the space "pending" awaiting a new hire or position backfill? (Email pilgrimdunnd@ecu.edu)	Yes N/A	
Submitted a ticket to revoke the employee's Banner Security Access ?	Yes N/A	
Submitted a ticket to terminate the employee's Privileged Account Access ?	Yes N/A	
Forwarded the transfer checklist and all attachments? <ul style="list-style-type: none"> • SHRA, CSS, DMSS, & EHRA Non-Faculty: employeerelations@ecu.edu • EHRA Faculty: email to POSO personnel representative 	Yes N/A	