



# Faculty & Staff Transfer Checklist

This checklist outlines employment exit procedures for:

- Regular, partial year, and temporary faculty and staff
- Transferring or reassigning from one UGA department to another UGA department

Employee name \_\_\_\_\_

- Reason for separation
- Resignation
  - Termination
  - Transfer
  - Death

Employee dept. \_\_\_\_\_

Transfer effective date \_\_\_\_\_

Check (✓) when complete or indicate N/A

### Employee responsibilities

- Submit oral or written notice of intent to transfer to another department.
- Contact Parking Services to request lot change as desired and available ([parking@uga.edu](mailto:parking@uga.edu) or 2-PARK).
- If you are actively conducting research in a UGA Laboratory, complete the procedure for closing a laboratory. Complete and sign the "Closing a Laboratory" checklist (<http://www.esd.uga.edu/chem/pub/closinglab.pdf>). Attach the "Closing a Laboratory" checklist to this checklist and give to your supervisor or other departmental representative prior to your last day at work in your current department.
- Return all University property to appropriate departmental personnel (e.g. keys, uniforms, cell phone, pager, laptop/ computer equipment, audiovisual equipment, cameras, exhibits, lab equipment, long distance authorization card, Purchasing card, Corporate MBNA card, reference books, handbooks, slides).
- Complete, sign, and submit your final time sheet(s) and leave form(s) as applicable and submit to appropriate departmental personnel
- Change, if necessary, your contact information on the UGAAlert emergency notification system (<http://ugaalert.uga.edu/>)
- If you participated in the Georgia Defined Contribution Plan (GDGP) and desire to apply for a refund, obtain and submit the return of contributions form following the instructions found at <http://www.hr.uga.edu/benefits/bensumm/gdcp.html>.
- Unsubscribe from appropriate departmental listservs.
- Set voice mail pass code to your 5-digit campus phone number.
- Remove all personal items from your work space.
- Submit this completed checklist to your supervisor or departmental representative.
- For W-2 purposes, use space below to provide new address information to your supervisor if your address will change.

Complete mailing address

### Supervisor or departmental responsibilities

- Prior to the employee's last day of work, inventory the equipment s/he uses. Prepare necessary paperwork to transfer equipment to appropriate department or person.
- If the employee is actively conducting research in a UGA Laboratory, review the procedure for closing a laboratory. Fax a copy of the completed and signed "Closing a Laboratory" checklist (<http://www.esd.uga.edu/chem/pub/closinglab.pdf>) to Environmental Safety at 706-542-0108. Attach the original "Closing a Laboratory" checklist to this (exit) checklist and forward to Human Resources.
- Audit annual leave, compensatory time, sick leave balances; verify repayment of salary overpayments.

**Supervisor or departmental responsibilities (cont.)**

- Complete the UGA Separation Notice Department of Labor Form (DOL-800) ([http://www.busfin.uga.edu/forms/separation\\_notice.pdf](http://www.busfin.uga.edu/forms/separation_notice.pdf)) only under the following conditions:
  - The employee is currently in a “regular” position and is transferring to a “temporary” or “student employee” position
  - The employee is currently in a “temporary” position and is transferring to a “student employee” position
  - The employee is leaving UGA employment and transferring to another University System position without a break in serviceRead instructions on form to clearly detail specific reason for termination. Give the original separation notice to the employee on his/her final work day. Forward a copy to Human Resources. Additional instructions are provided with the form.
  
- If the classified employee has not been evaluated in the past 12 calendar months, or if the employee’s performance has changed substantially since the last evaluation, complete a final performance evaluation and provide a copy to the employee. (Not required for temporary employees.)
- Conduct an exit meeting with the transferring employee. (Not required for temporary employees.)
- Initiate a personnel report indicating “Transferred to another UGA department” as the reason for the personnel action.
- Terminate employee’s access to **departmental** servers and systems including departmental distribution lists and listservs, email accounts, accounting, budget, and payroll/personnel systems, etc.
- Remove transferring employee’s name from authorized departmental signature lists, including payroll distribution, payroll voucher, checking accounts, various security rosters, etc.
- If the employee has a departmental P-card, retrieve the card and call Procurement to cancel the employee’s authorization.
- Send final and previous performance evaluations completed since 2000 to Human Resources for inclusion in the employee’s personnel file. (Note: Performance evaluations prior to 2000 should already be on file in Human Resources.) (Not required for temporary employees.)
- Forward **the original** of the transferring employee’s I-9 form plus supporting documentation to his/her new UGA department.
- Other: \_\_\_\_\_

Comments:

\_\_\_\_\_  
Employee signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor/departmental representative signature

\_\_\_\_\_  
Date

**Use this form to ensure compliance with appropriate procedures.  
Retain signed original in departmental files, if desired.**