

## **EMPLOYEE TRANSFER CHECKLIST**

*A separation checklist and termination ePAF are not required for employees transferring to another department.  
The separation checklist is only required for employees leaving the University.*

**1) Departments should complete the following for any employee transferring to another department on campus:**

***The checklist below should be done prior to the last day worked.***

- ☐ Remove all (Financial and HR) security access for your department and employee information within OMNI, which may include attendance and leave and department representative roles. If applicable, submit roles through eORR. ***Query FSU\_DPT\_VERIFY\_SECURITY\_ROLES can be used to verify your employee's department security.***
- ☐ Remove all security access for building and offices and collect all keys.
- ☐ Collect all department property such as laptop computers, lab equipment, uniforms, etc.
- ☐ For Salaried employees - audit all leave records and ensure that the leave balances are correct in OMNI.
- ☐ Travel and Purchasing Procedures:
  - Travel Advances - contact travel ([travel@fsu.edu](mailto:travel@fsu.edu)) to determine if any outstanding or pending Travel Cash Advances exist.
  - Travel Card
    - Employee's supervisor is to complete the [Travel Card Cancellation Request](#) and return it to the T-Card Administrator ([travelcard@fsu.edu](mailto:travelcard@fsu.edu)) immediately upon notice of employee's transfer.
    - Employee's supervisor is to destroy the employee's T-Card.
    - Employee is to submit expense report(s) for all available T-Card charges.
  - Purchasing Card
    - Email [pcard@fsu.edu](mailto:pcard@fsu.edu) to verify with P-Card Administrator that the P-Card has been returned by cardholder.
    - Proxies – Submit Proxy Termination/Transfer Request form through SpearMart. The FSU\_DPT\_PCARD\_PROXYUSERS (FI) query can be run to determine the proxies in your department.
- ☐ If employee supervises employees, ePAFs must be completed to change the supervisor on Job Data.
- ☐ Inform employee to update address, campus and fax phone number within OMNI Employee Self Service.
- ☐ Check Actives and Cost Center Report after last day of work to ensure employee is not on your payroll.
- ☐ Contact the I-9 Administrator in HR to transfer the I-9 to the correct department.
- ☐ Complete a Position Management Action Page (PMAP) only if the position number is being transferred to the new department.
- ☐ Petty Cash Funds – Run the FSU\_DPT\_AP\_OPEN\_ITEM\_BAL (FI) query to check for any outstanding petty cash advances. If an outstanding debt exists, contact Disbursement Services ([AccountsPayable@fsu.edu](mailto:AccountsPayable@fsu.edu)) for processing details.
- ☐ Run the FSU\_CF\_DEPT\_ALL\_DESIGNATIONS (FI) query to determine if the separating employee is a Budget Manager/Concur Approver, Authorized Signer, Hyperion Salary/Budget Preparer or Dean/Director/Department Head/Chair (see [Controller's Office website](#) for details). To remove the employee, complete the Budget Office form, Update Existing Department ID. Run OMNI query FSU\_DEPT\_MNGR\_REP\_BY\_DEPT (HR) to determine if the separating employee is a Department Manager or Representative. Submit a [HR Department Table Update form](#) to update this information.
- ☐ Contact RAMP-CAMS Support at [RAMP@fsu.edu](mailto:RAMP@fsu.edu) to remove access to any records the employee will no longer need access to. See [here](#) for complete instructions.
- ☐ If the employee receives a cell phone allowance, please submit a [Cellular Communication Services Allowance Discontinuation Form](#). If the cell phone allowance is not terminated, your department will continue to be charged for the allowance.

2) If the employee is a faculty member transferring to another department, please complete the additional steps below:

***Documents to send to new department***

- ☐ **Personnel File** (offer letter, side letter, copies of appointment papers, and faculty contracts)
  
- ☐ **Evaluation File** (assignment of responsibility forms; annual evaluations, letters of progress toward tenure and/or promotion, peer teaching evaluations, and sustained performance documentation. SUSSAI/SPOT summary forms, promotion & tenure binders, and other confidential documents should be sent for tenured associate and full professors)
  
- ☐ **Twelve-Hour Compliance File**
  - \*The original home department may need to retain a copy of the most recent contract and the most recent Assignment of Responsibilities for use in completion of FACET forms.
  - \*\*The original home department may need to retain a copy of the most recent SUSSAI/SPOT Summary forms for use in providing input to the new department on teaching for the annual evaluation, if applicable.