

Departmental use only
Do not forward to HR



UNIVERSITY OF
GEORGIA

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 _____

Employee dept. _____

Transfer effective date _____

Check when complete or indicate N/A

Employee responsibilities

- If you have a P-Card, notify your Approving Official, Department Head, and a P-Card Administrator in Procurement in writing and turn in the P-Card to one of these individuals.
- Contact Parking Services to request lot change as desired and available (*parking@uga.edu* or 2-PARK).
- If you are actively conducting research in a UGA Laboratory, complete the procedure for closing a laboratory: <http://research.uga.edu/safety/chemical-laboratory/opening-closing-lab/>
- 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
- If you participated in the Georgia Defined Contribution Plan (GDGP) and desire to apply for a refund of your contributions, visit the ERSGA web site (<https://www.ers.ga.gov/georgia-defined-contribution-plan>)
- Unsubscribe from appropriate departmental listservs.
- Set voice mail pass code to 2580#.
- 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, complete the procedure for closing a laboratory: <http://research.uga.edu/safety/chemical-laboratory/opening-closing-lab/>
- Audit annual leave, compensatory time, sick leave balances; verify repayment of salary overpayments.
- If the employee is leaving a leave-eligible position and your department is paying out annual leave, be sure to clear the annual leave from the eLeave system.
- If the employee has a P-Card, confirm that (1) the P-Card has been cancelled, cut, and the pieces returned to a P-Card Administrator in Procurement; (2) all transactions have been signed off in Works; (3) and adequate documentation exists for each transaction before the employee transfers to their new department.

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) 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. Additional instructions are provided with the form.
- 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.
- Initiate a personnel report indicating “Transferred to another UGA department” as the reason for the personnel action.
- Keep the employee’s personnel file (including performance evaluations) with other departmental staff personnel files. Maintain files as as described in USG retention guidelines http://www.usg.edu/records_management/schedules/
- Send an email to i9online@uga.edu to transfer the employee’s I-9 form to the new department.
- Other: _____

Comments:

Employee signature

Date

Departmental representative signature

Date

Retain this completed form in departmental files, if desired
(Do not send to HR)