

## Manager/Supervisor Checklist for Internal Transfer Processing

Employee Name	
PID	
ID Number	
Title	
Supervisor	
Department/Group	
Transfer Date	

Category	Description	Date Completed
Documentation	Obtain resignation letter/email from employee.	
	Write the <a href="#">resignation acceptance letter</a> and provide to employee.	
	Contact your department enterer to enter the separation action (PAF) in Banner to ensure proper removal of system access.  - SEPUT for transfer within the university Retain transaction confirmation for records.(email transaction or screenshot).	
	Maintain completed Department/Manager and Employee checklists for records as needed.	
University Assets and Financial Steps	Follow departmental guidance to remove building access for employee.	
	Collect fuel card for applicable employees and return to fleet services.	
	Contact <a href="mailto:purchasecard@vt.edu">purchasecard@vt.edu</a> to notify the employee's P-card needs to be cancelled in the system; destroy card once confirmation has been received that card has been cancelled.	
	Remove any cash-related responsibilities and close out fund.	
	Return employee keys to appropriate office/person.	
	Obtain university property (cell phone, laptop, tablet, books, Duo hardware token, etc.).	

Category	Description	Date Completed
Transition Activities	Approve all outstanding timesheets so they can be processed by payroll.	
	Conduct transfer interview or send transfer interview link to employee.	
Payroll/ Benefits	Coordinate with the to approve leave during the transfer period. Have the employee speak with the Leave team ( <a href="mailto:hrleave@vt.edu">hrleave@vt.edu</a> ) if a leave payout is due.	
	Confirm if there is an outstanding tuition advance/reimbursement/waiver. Have this confirmed by the Bursar's Office.	
	Ensure that all travel and personal reimbursements for the employee has been submitted with proper documentation and approved before last day in office.	
Items to remind employee to do	Submit all outstanding timesheets for approval. Set up meeting with employee if applicable.	
	Complete any outstanding leave reports and time sheets for approval.	
	Review all outstanding assignments with supervisor.	
	Send any business-related emails to appropriate person.	
	Remove any personal information from university property (i.e. email, laptop, cell phone)	
	Remove any business-related information from personal property (i.e. home computer, personal cell phone)	
	Remove all personal items from office/desk/locker, and clean and organize office/desk/locker.	
	Update voicemail/email with an "out of office" reply and indicate a contact person.	
	If applicable, return parking permits to Parking Services to avoid any fees.	
	Reconcile final university-issued purchasing card statement if applicable.	
	Ensure that all travel and personal reimbursements have been submitted with proper documentation and approved before last day in office.	

Category	Description	Date Completed
<b>Items to remind employee to do</b> <i>Continued</i>	Return any university assets including laptop, monitor, chair, office equipment, and other equipment.	
	If applicable, direct the employee to clean out any laboratory or chemical storage areas and contact Environmental Health and Safety Services for removal of any hazardous waste or excess chemicals.	
<b>Department-Specific Transactions</b>		