

# Transfer checklist

This checklist is designed as an easy reference to assist Managers and Departmental Administrators in ensuring that all the relevant steps are taken before an individual leaves their department to move to a new department. The third column shows whether capturing this information is always necessary, should be considered, or is dependent on the circumstance.

Employee Name: \_\_\_\_\_ Personnel No: \_\_\_\_\_

Leaving Date: \_\_\_\_\_

Area/question for checking	Guidance	When required	✓
<b>Resignation Tendered</b>			
1. Has the leaver's resignation letter been received and passed to the relevant person for follow-up?		Always	
2. Have arrangements been agreed with the new department – transfer date etc?		Always	
3. Has the transfer request been received and approved?	Refer to <b>QRG: PA2e_Appoint Transfer (Transfer to new department)</b>	Always	
4. Have you considered conducting an exit interview with the leaver?		Consider	
<b>Pre-departure</b>			
5. Has the leaver's holiday entitlement been agreed with the new department?	Accrued and untaken holiday for staff transferring between departments is a matter for negotiation between departments.	Always	
6. Does the leaver have any outstanding loans from the department?	Repayment methods for these should be discussed and agreed with the relevant department and/or finance.	Consider	
7. If the employee is also a Self-Service Manager, the department from which the employee is leaving should complete a Service Request to remove their manager access to the original Work Group.	Service Request available from the <a href="#">HRIS Service Catalogue page</a> .	Consider	
<b>Last Day</b>			
8. Has the leaver handed in keys (to any files, drawers, desks, etc), mobile phone, lab coat, etc or other such departmental property?	As per department guidelines.	Always	

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9. Has the relevant IT department been notified to ensure system/IT access is removed?		Always	
10. Has the leaver removed their personal possessions?		Consider	